

***CMS Net***

# **Eligibility Tracking**

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## **Preface**

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### **Legend**

In procedures on the following pages, you will see various symbols used.

- ✓ When describing a procedure, the check mark indicates the result of an action.
- ➡ The arrow indicates a content note.

## Eligibility Tracking

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### Overview

This document contains information about the CMS Net Eligibility Tracking screen

This is a reference screens and will be Display Only.

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### Screen Functions

These screens will allow the user to review:

- Review the current and historical residential status,
  - Review the current and historical financial status,
  - Review the current and historical enrollment and assessment fees and payment plans,
  - Review the current and historical medical eligibility status,
  - Review and track the interview and Medi-Cal application processes,
  - Review the medical report request and received history,
  - Review the current and historical program eligibility status,
  - Review the Client Eligibility History, and
  - Review the beneficiary card request history
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## Eligibility Tracking Screen

### Overview

The Eligibility Tracking screen allows the user to track the overall eligibility process for a client. All fields on this screen are Display Only.

Users access the Eligibility Tracking screen in one of **two** ways.

Step	Action
1	From the Eligibility Menu, select Eligibility Tracking. <b>Or</b>
2	From the Client Eligibility screen, in the "Case Status" field, access the 2 <sup>nd</sup> level help as follows:  For a PC, key <Shift+F1>  For a Terminal, key <PF14>

CMSNET		ELIGIBILITY TRACKING		CMSET-10	
Pt Nm: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		CCS#: 9999999		CIN: 99999999X 9	
1) Gender: X		DOB: 99/99/9999		Lgl Co: XXXXXXXXX REG=XXXXXXX MED=X F/R=X	
2) Pgrm Begin Date 99/99/9999		End 99/99/9999		CCS Elig Status XXXXXXXXXXXXXXXXXXXX	
ELIGIBILITY SEGMENT	EFFECTIVE DATE	STATUS	REASON		
3) Residential Status	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		
4) Financial Status	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		
5) Assessment Fee Status	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		
6) Enrollment Fee Status	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		
7) Medical Elig Status	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		
8) M/C Appl Status	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		
9) PSA Signed	a) 99/99/9999	b) XXXXXXXXXXXXXXXXXXXX	c) XXXXXXXXXXXXXXXXXXXX		

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## Eligibility Tracking Screen, Continued

**Eligibility  
Tracking  
Screen Field  
Descriptions**

The table below lists field numbers, names, and descriptions for this Display Only screen.

Field #	Field Name	Description/Comments
1	(Header)	<b>Display Only</b> Common header from the Patient Registration Screen
2a	Pgrm Begin Date	<b>Display Only</b> Populated from Pending Eligibility or Program Eligibility screen
2b	End	<b>Display Only</b> Populated from Pending Eligibility or Program Eligibility screen.
2c	CCS Elig Status	<b>Display Only</b> Populated from Client Eligibility
	Residential Status	<b>Display only Eligibility Segment</b>
3a	Effective Date	<b>Display Only</b> Populated from Residential Worksheet
3b	Status	<b>Display Only</b> Populated from Residential Worksheet
3c	Reason	<b>Display Only</b> Displays a reason why patient is ineligible. Populated from Residential Worksheet
	Financial Status	<b>Display only Eligibility Segment</b>
4a	Effective Date	<b>Display Only</b> Populated from Financial Worksheet,
4b	Status	<b>Display Only</b> Populated from Financial Worksheet
4c	Reason	<b>Display Only</b> Populated from Financial Worksheet
	Assessment Fee Status	<b>Display only Eligibility Segment</b>
5a	Effective Date	<b>Display Only</b> Populated from Enrollment & Assessment Fees Screen
5b	Status	<b>Display Only</b> Populated from Enrollment & Assessment Fees Screen
5c	Reason	<b>Display Only</b> Populated from Enrollment & Assessment Fees Screen

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## Eligibility Tracking Screen, Continued

### Eligibility Tracking Screen Field Descriptions (continued)

<b>Field #</b>	<b>Field Name</b>	<b>Description/Comments</b>
	Enrollment Fee Status	<b>Display only Eligibility Segment</b>
6a	Effective Date	<b>Display Only</b> Populated from Enrollment & Assessment Fees Screen
6b	Status	<b>Display Only</b> Populated from Enrollment & Assessment Fees Screen
6c	Reason	<b>Display Only</b> Populated from Enrollment & Assessment Fees Screen
	Medical Elig Status	<b>Display only Eligibility Segment</b>
7a	Effective Date	<b>Display Only</b> Populated from Medical Eligibility
7b	Status	<b>Display Only</b> Populated from Medical Eligibility
7c	Reason	<b>Display Only</b> Populated from Client Eligibility; may be blank
	M/C Appl Status	<b>Display only Eligibility Segment</b>
8a	Effective Date	<b>Display Only</b> Populated from Pending Eligibility
8b	Status	<b>Display Only</b> Populated from Pending Eligibility
8c	Reason	<b>Display Only</b> Populated from Pending Eligibility
	PSA Signed	<b>Display only Eligibility Segment</b>
9a	Effective Date	<b>Display Only</b> Populated from Program Eligibility
9b	Status	<b>Display Only</b> Populated from Program Eligibility
9c	Reason	<b>Display Only</b> Populated from Program Eligibility

### **Exit the Screen**

Exit this screen by pressing <Enter>.

NOTES

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